



Document  
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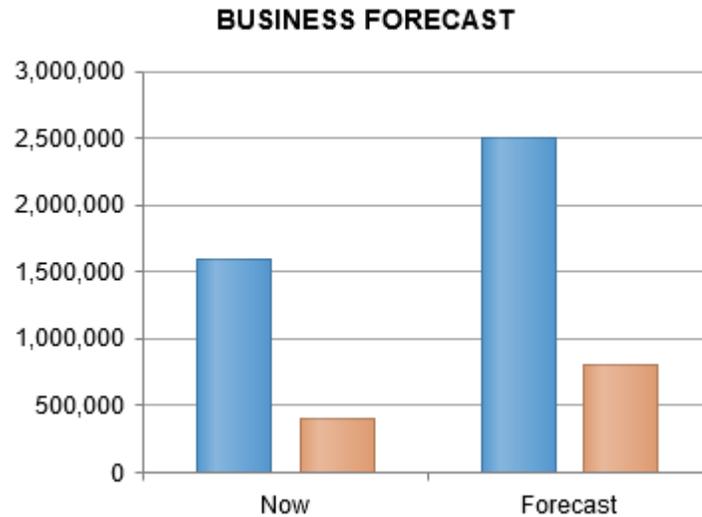
# Client Needs Analysis Sample Company

This document was prepared for  
Sample Client, on behalf  
of Sample Company



## HIGH LEVEL GOALS

During our interview you indicated that you had a number of high level financial objectives that you would like to achieve. If you achieved these goals your turnover would increase from 1,600,000 to 2,500,000. We have highlighted a high level summary of your financial goals below.

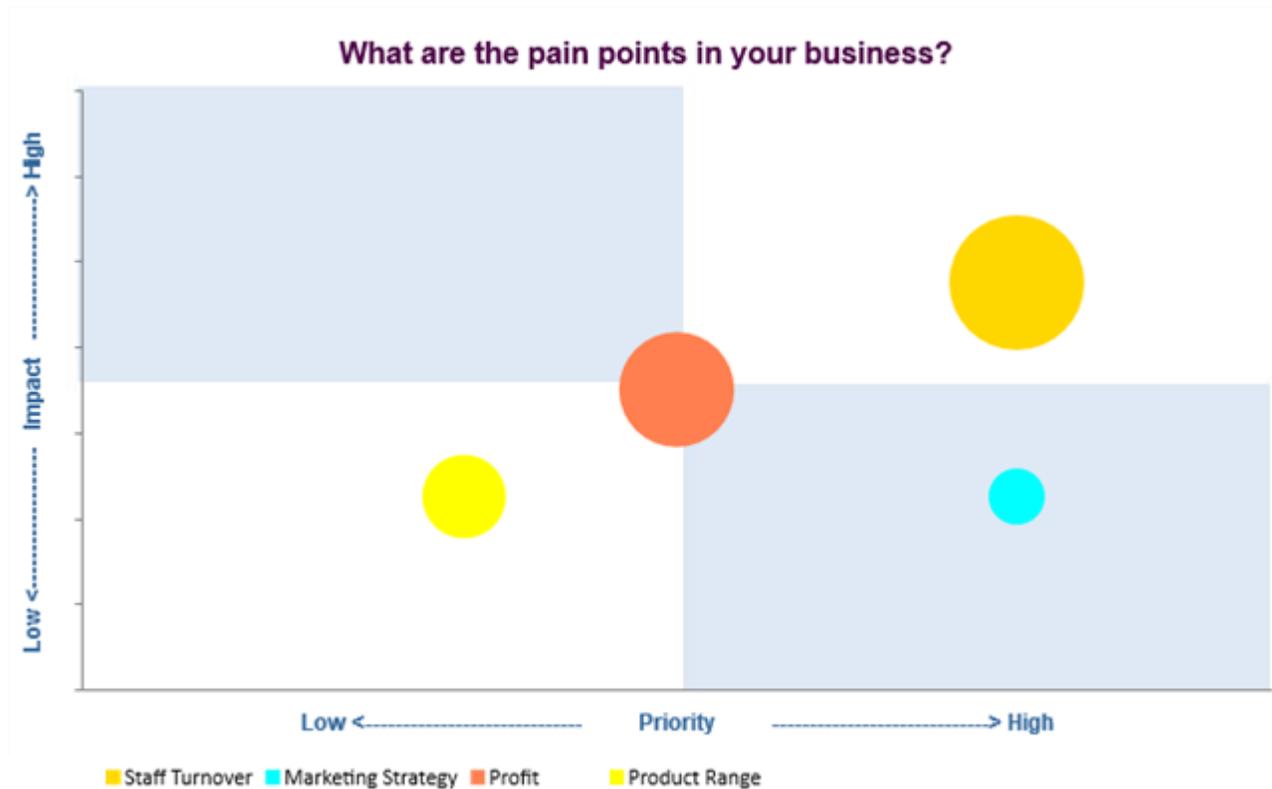


| Business Goals             | Now       | Desired Future Level |
|----------------------------|-----------|----------------------|
| <i>Revenue</i>             | 1,600,000 | 2,500,000            |
| <i>Profit</i>              | 400,000   | 800,000              |
| <i>Margin</i>              | 25%       | 32%                  |
| <i>Number of employees</i> | 2         | 4                    |

| Personal Shareholder Goals                               | Now       | Desired Future Level |
|--|-----------|----------------------|
| <i>Estimated total remuneration</i>                      | 110,000   | 250,000              |
| <i>Estimated personal stress level (1 low – 10 high)</i> | 9         | 3                    |
| <i>Ideal Exit Timeframe (years)</i>                      |           | 5                    |
| <i>Amount needed to exit or move on</i>                  | 0         | 0                    |
| <i>Estimated Business Value</i>                          | 1,200,000 | 3,500,000            |

## THE PAIN POINTS IN YOUR BUSINESS

During our interview you indicated that you had a number of “Hot Issues” that you would urgently like to address. As part of this process we will look at the development of two programs a longer term development program and a 90 day action plan to solve urgent issues.



| Pain Point         | Priority   | Impact      | Financial Impact |
|--------------------|------------|-------------|------------------|
| Staff Turnover     | High       | Medium High | 70,000           |
| Marketing Strategy | High       | Medium Low  | 10,000           |
| Profit             | Medium     | Medium      | 50,000           |
| Product Range      | Medium Low | Medium Low  | 25,000           |

### Methodology

1. Review of urgent issues
2. Problem identification
3. Potential Solutions
4. Selection of most appropriate solution
5. Action and implementation to resolve the issues

## Priority Areas

### Business Strategy & Plans



High

### Strategy Execution



Medium

### Financial Health



High

### Exit Succession



High

### People Issue



Medium High

### Systems and Processes



Medium High

We have grouped the above areas and into categories and then asked you to indicate what you felt was the priority in development.

| What does this area include?  | Possible client outcomes  | Priority Indication  |
|---|---|--|
| <b>Business &amp; Strategic Plans:</b><br>Developing a Business Plan                                    | Improved profitability, increased revenue, better business direction and alignment, less stress on the CEO, greater accountability to performance, better financial management. Review of the business model. | You indicated that this had the following priority level...<br><br><b>High</b>   |
| <b>Strategy Execution:</b><br>Making sure that the organisation is implementing the strategic direction | Establishment of clear strategic direction with clear delegation of responsibilities to key staff. Ensuring organisational alignment and accountability.  | You indicated that this had the following priority level...<br><br><b>Medium</b> |
| <b>Financial Health:</b><br>Profit improvement, cash flow and budgeting                                 | Analysis and review of the existing financial health to determine gaps and inefficiencies. Review of budgets and financial strategies. Development of "What if" scenarios and forecasts.                      | You indicated that this had the following priority level...<br><br><b>High</b>   |

**Exit & Succession Planning:**  
What is the business worth now and how can it be improved?

Renewed enthusiasm in running the Business as it is now linked to a higher purpose, improvements in business. Higher likelihood of a business sale. Improvements in profit and revenue.

You indicated that this had the following priority level...

**High**

**People Issues:**  
Review and improvement of HR and customer communication, systems and processes.

Improvements in staff motivation and morale, staff accountability and KPI targets, staff performance, increased Profit and revenue, reductions in staff turnover and risk of employee litigation.

You indicated that this had the following priority level...

**Medium High**

**Systems & Growth:**  
Review and recommendation of better systems and documentation.

Improvements in productivity, quality, customer satisfaction, increased profit and revenue and reduced Risk of legal liability.

You indicated that this had the following priority level...

**Medium High**

## Client Education, Discussion Items & Possible Strategies

### Business & Strategic Planning

Conduct an audit of your operations, financials, marketing, human resource, product development and production processes. Review your market and competitors and combine the data into a one page SWOT Analysis that highlights your business strengths and weaknesses with external opportunities and threats.

This analysis becomes the cornerstone to your strategic plan. This overall strategy will then need to be worked into a detailed strategic plan. This means for every component such as marketing, advertising, sales, OHS, and others, you will need to detail how you are going to achieve your goals.

You also need to understand which KPI's (Key Performance Indicators) you are measuring so you are able to adjust accordingly if your goals are not being met. It certainly does come back to "measure, measure, measure..." Document everything you measure in your plan and you will be halfway to reaching your goals.

(Recommended Software implementation: MAUS Hub – MasterPlan module)

### Sales & Profitability

Almost every business owner needs help with improving sales and profitability. How do we achieve greater sales and profitability and how do we measure it? There are many formulas out there that state the obvious, however, it is essential that for any business to succeed in improving sales and profitability, they must put this knowledge into action and again "measure, measure, measure..."

So what is the easiest way to increase profits? The two most obvious ways are increasing your prices and decreasing your costs. Of course, if you are not measuring all the other aspects of your business such as customer satisfaction etc. you may drive customers away by increasing prices. Other things affect your profitability such as number of leads, conversion rate and margins.

To improve sales and profitability, your business needs to understand all aspects of your revenue, expenses, assets and profits.

(Recommended Software implementation: MAUS Hub – MasterPlan, MAUS Hub – Virtual CFO modules)

## Accountability & Strategy Execution

Everybody in the organisation should be accountable to the strategic plan.

Implementing a balanced scorecard for your organisation and then reviewing all KPI's for the business from the tangible to the intangible is the most accurate way of measuring the engagement level of the organisation.

Have I ensured that my people know where the organisation is going? Do they know the Mission and Vision? Are they as committed to the business as I am?

Communication is the key component to accountability. Put simply, as a business owner you need to use effective communication and work towards engaging the whole organisation.

(Recommended Software implementation: MAUS Hub – KPI Dashboard module)

## Exit & Succession

Exit Planning refers to the process of planning for the eventual exit from the business of the business owner or owners. This process will need to review (amongst other things)

- The type of exit (i.e. how the transition of ownership will occur. Will it be sold to a family member, private buyer, employees or other?)
- The objectives and goals of all stakeholders. The transition of employees into new roles and responsibilities to fill the vacuum of the departing business owner.
- The transition of the optimal strategic and operational plans to ensure the maximum value and lifestyle objectives for the business owners. In some cases the strategic plan may be altered 2-3 years before the final transition to ensure that the business meets the objectives of the likely potential purchasers.

Most entrepreneurs do not understand the drivers that underpin an exit strategy. Selling a business is a marketing exercise that involves planning, preparation and a compelling pitch. The issue most entrepreneurs have is that they are inseparable from the business itself. "You are the Business". Even when there are employees, the "average" business owner does not delegate and as a result potential buyers cannot see the value of the business itself.

The solution is to start preparing your Exit and Succession Plan as you do your Business Plan. When you set your measures and milestones for the business, bear in mind the need to create value others are prepared to pay for. You also need the systems and processes implemented in order to be able to walk away and have the business continue. As you develop your business, these systems and processes will enable you to go on holidays and not worry. Ultimately, though, it means a comfortable retirement knowing your dream is still going.

Last, but not least, is the imperative to know what your business is really worth so that when it does come to sale time, you will not undervalue the business. So spend the time to plan for exit and succession and the rewards will follow. In summary, plan for everything, separate the business from the business owner to create saleable value and know what the business is worth before you sell.

(Source: Institute of Exit Advisors..([www.instituteadvisors.com.au](http://www.instituteadvisors.com.au)))

(Recommended Software implementation: MAUS Hub – Exit Planner Pro module)

**And much more in full report!!**

# High Performance Business Quiz

## Highlights Report

**Date:** 15 Aug 2016

**Result:** 58%

|                                      | Answer | Best Answer | Score      |   | Comments                            |
|--------------------------------------|--------|-------------|------------|---|-------------------------------------|
| <b>High Level Goals</b> 😞            |        |             | <b>46%</b> |   |                                     |
| Business Goals                       | 1      | 6           | 17 %       | ✗ | Haven't been updated since 2012     |
| Exit Goals                           | 3      | 6           | 50 %       | ✗ |                                     |
| Personal Goals                       | 5      | 6           | 83 %       | ✓ | Updated at start of financial year! |
| High Level Strategies                | 2      | 6           | 33 %       | ✗ |                                     |
| <b>Strategic Goals</b> 😐             |        |             | <b>72%</b> |   |                                     |
| Customer Satisfaction                | 5      | 6           | 83 %       | ✓ | Result                              |
| Success Factor Goals                 | 2      | 6           | 33 %       | ✗ |                                     |
| Strategies & Actions linked to Goals | 6      | 6           | 100 %      | ✓ |                                     |
| <b>Milestones/Actions</b> 😞          |        |             | <b>56%</b> |   |                                     |
| Milestones                           | 4      | 6           | 67 %       | ✗ |                                     |
| 90-Day Action Plan                   | 1      | 6           | 17 %       | ✗ |                                     |
| Milestone Review                     | 5      | 6           | 83 %       | ✓ |                                     |
| <b>Monthly Business Review</b> 😞     |        |             | <b>56%</b> |   |                                     |
| Goals                                | 1      | 6           | 17 %       | ✗ |                                     |
| Strategic Review                     | 3      | 6           | 50 %       | ✗ |                                     |
| Milestones                           | 6      | 6           | 100 %      | ✓ |                                     |
| <b>Systems &amp; Workflow</b> 😞      |        |             | <b>57%</b> |   |                                     |
| Document Management                  | 3      | 6           | 50 %       | ✗ |                                     |
| Accountability                       | 1      | 6           | 17 %       | ✗ |                                     |
| Policies                             | 4      | 6           | 67 %       | ✗ |                                     |
| Customer Service Issues              | 5      | 6           | 83 %       | ✓ |                                     |
| Operational Issues                   | 1      | 6           | 17 %       | ✗ |                                     |
| Incident Register                    | 3      | 6           | 50 %       | ✗ |                                     |
| Employee Liability Threats           | 6      | 6           | 100 %      | ✓ |                                     |
| CRM                                  | 4      | 6           | 67 %       | ✗ |                                     |
| Financial Forecast                   | 6      | 6           | 100 %      | ✓ |                                     |
| Accounts System                      | 1      | 6           | 17 %       | ✗ |                                     |

| <b>Employee Engagement</b> 😞      |   | <b>63%</b> |       |   |  |
|-----------------------------------|---|------------|-------|---|--|
| Weekly Staff Meetings             | 5 | 6          | 83 %  | ✓ |  |
| Weekly Team Meetings              | 2 | 6          | 33 %  | ✗ |  |
| Staff Performance Standards       | 4 | 6          | 67 %  | ✗ |  |
| Monthly Performance Review        | 6 | 6          | 100 % | ✓ |  |
| Annual Performance Review         | 3 | 6          | 50 %  | ✗ |  |
| HR Policies                       | 1 | 6          | 17 %  | ✗ |  |
| Employee Contract                 | 6 | 6          | 100 % | ✓ |  |
| Contractual Performance Standards | 5 | 6          | 83 %  | ✓ |  |
| Culture                           | 2 | 6          | 33 %  | ✗ |  |
| <b>Performance Culture</b> 😞      |   | <b>56%</b> |       |   |  |
| Define your culture               | 1 | 6          | 17 %  | ✗ |  |
| Management Support                | 3 | 6          | 50 %  | ✗ |  |
| System Reminders                  | 6 | 6          | 100 % | ✓ |  |

# One Page Snapshot of Results

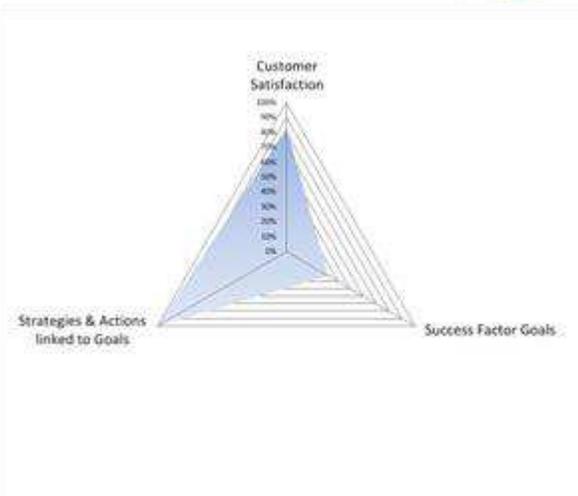
Your Score

58%

## High Level Goals



## Strategic Goals



## Milestones/Actions

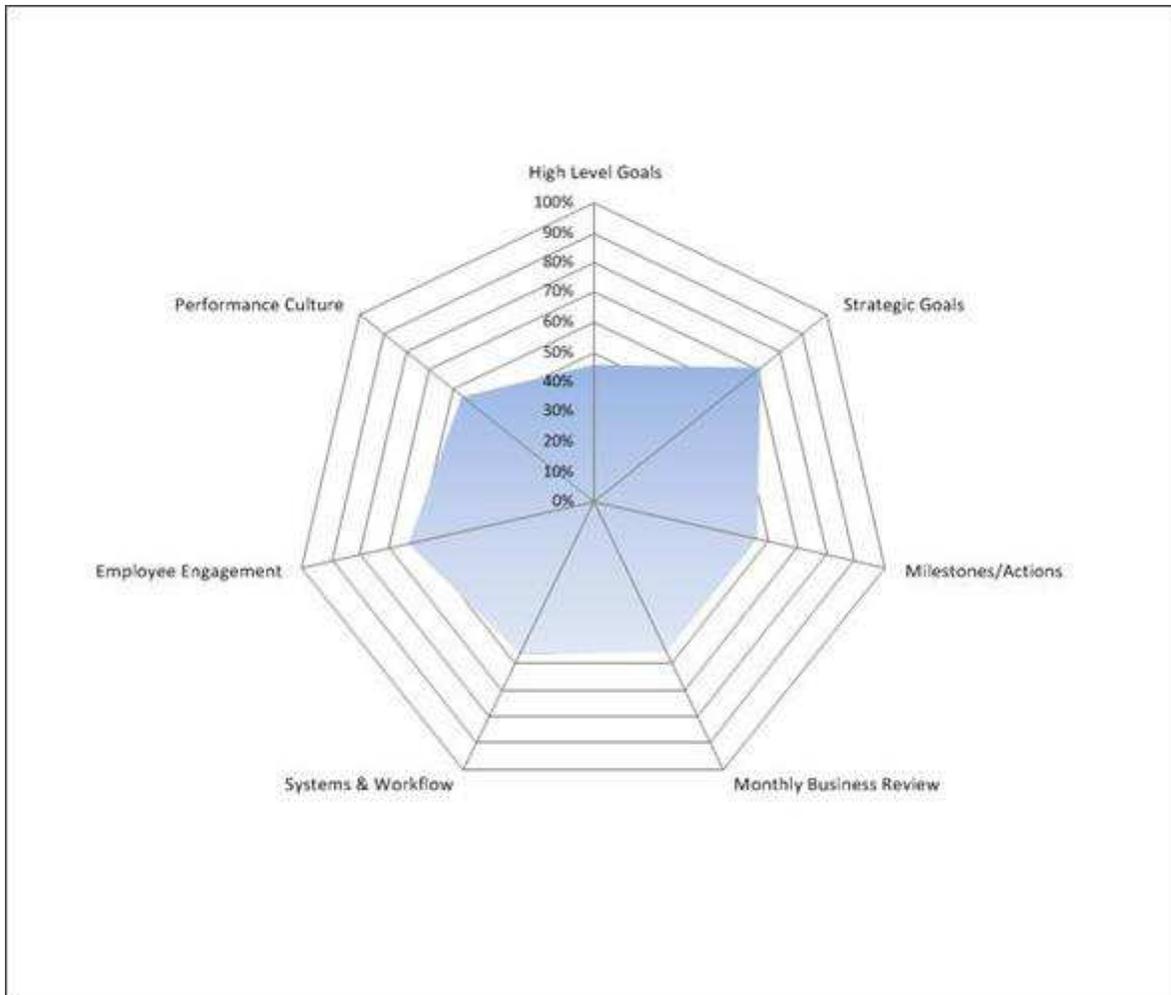


## Monthly Business Review



Breakdown of all 7 areas provided in full report!

The following graph is calculated by averaging your performance across a number of key areas. Based on our questionnaire we have drafted a radar chart that indicates the areas that you need to work on.



Based on your answers to these questions your score is 58%.

# High Level Goals



The probability that a business will not be successful is considerably higher for organisations that do not set goals. Goals are the starting point in the communication and commitment process. They set the guidelines for the accompanying strategy and financial investment.

1. SET YOUR GOALS & THE VISION OF THE BUSINESS
2. MAKE SURE YOUR GOALS ARE PRACTICAL
3. DETERMINE HOW YOU “STAND OUT FROM THE CROWD”
4. ESTABLISH HIGH – LEVEL STRATEGIES

All businesses should consider the vision of the business, where your business is headed and how it would like to be perceived as an organisation. This effectively establishes the standards of operation and the high-level mission of the organisation.

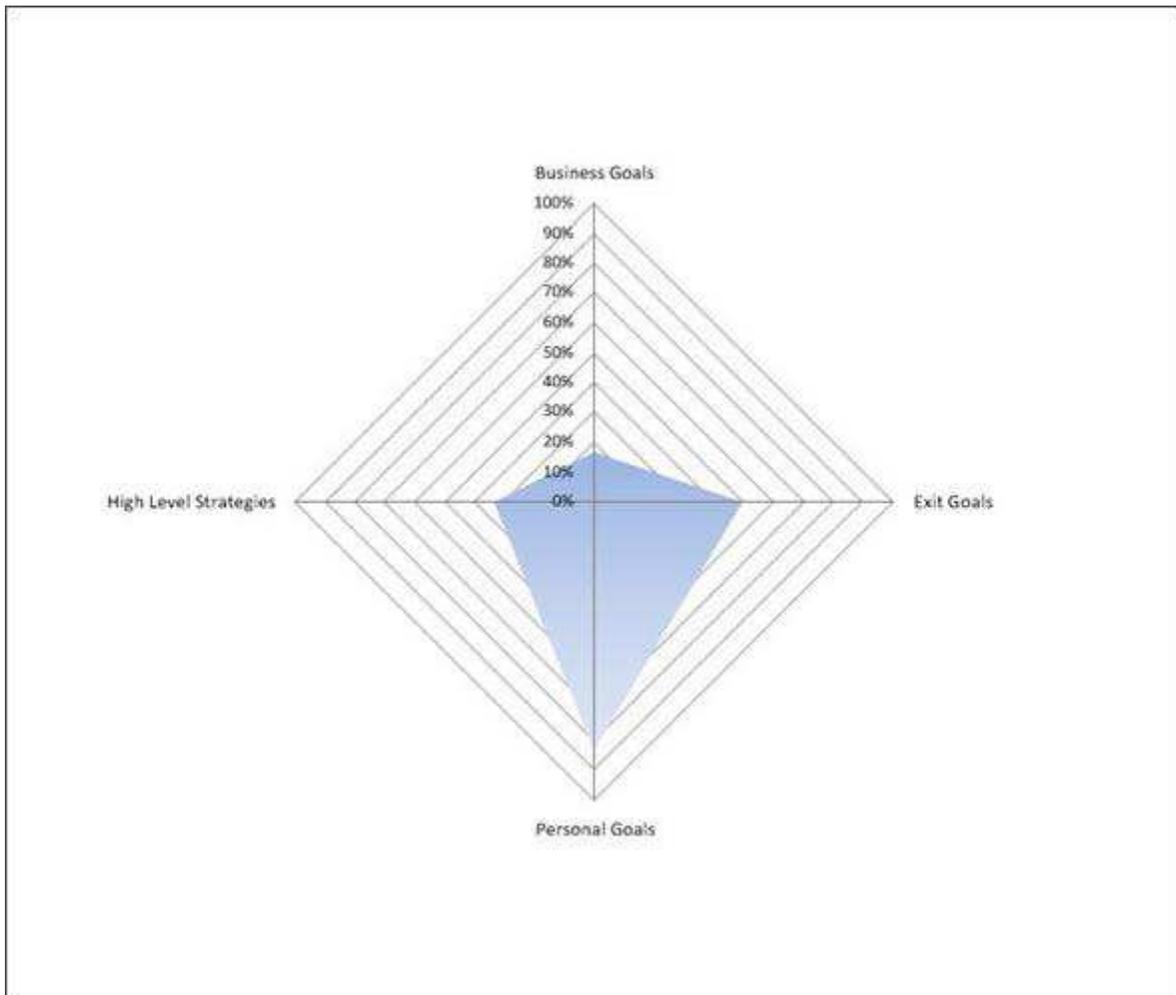
On a single page, the business needs to document a clear set of goals. These should include profitability and revenue as well as personal expectations. If there is an intention at some stage to exit the business, then the goals should state this time frame and the expectations.

Your business needs to consider how you stand out from the crowd. What is the key reason why a customer would buy from your business over your competitors?

Based on your answers to our questionnaire your business scored is 46% in this area.

| Topic                 | Analysis Area  | Score |
|-----------------------|--|-------|
| Business Goals        | Do you have your high level business goals documented? Define where the business is now and where it will be over the next 3 years?          | 1     |
| Exit Goals            | Do you have your high-level Exit and Succession planning goals documented with where you are and where you wish to be over the next 3 years? | 3     |
| Personal Goals        | Do you have your high-level Personal Goals documented? Where you are now and where you wish to be over the next 3 years?                     | 5     |
| High Level Strategies | Have you developed your high level business strategies? Have you defined how your business stands out from the crowd?                        | 2     |

## Graph of High Level Goals



# Strategic Goals



Revenue and profit represent key financial goals that can only be achieved with a viable strategy. The aggressiveness of the strategic goal is determined by your financial objectives.

The strategic goals should commence with a review of customer expectations. What makes the customer happy? What are our competitors offering to the customer and what can we offer to secure our market share? From this point you need to build the drivers of the business that support this customer focus.

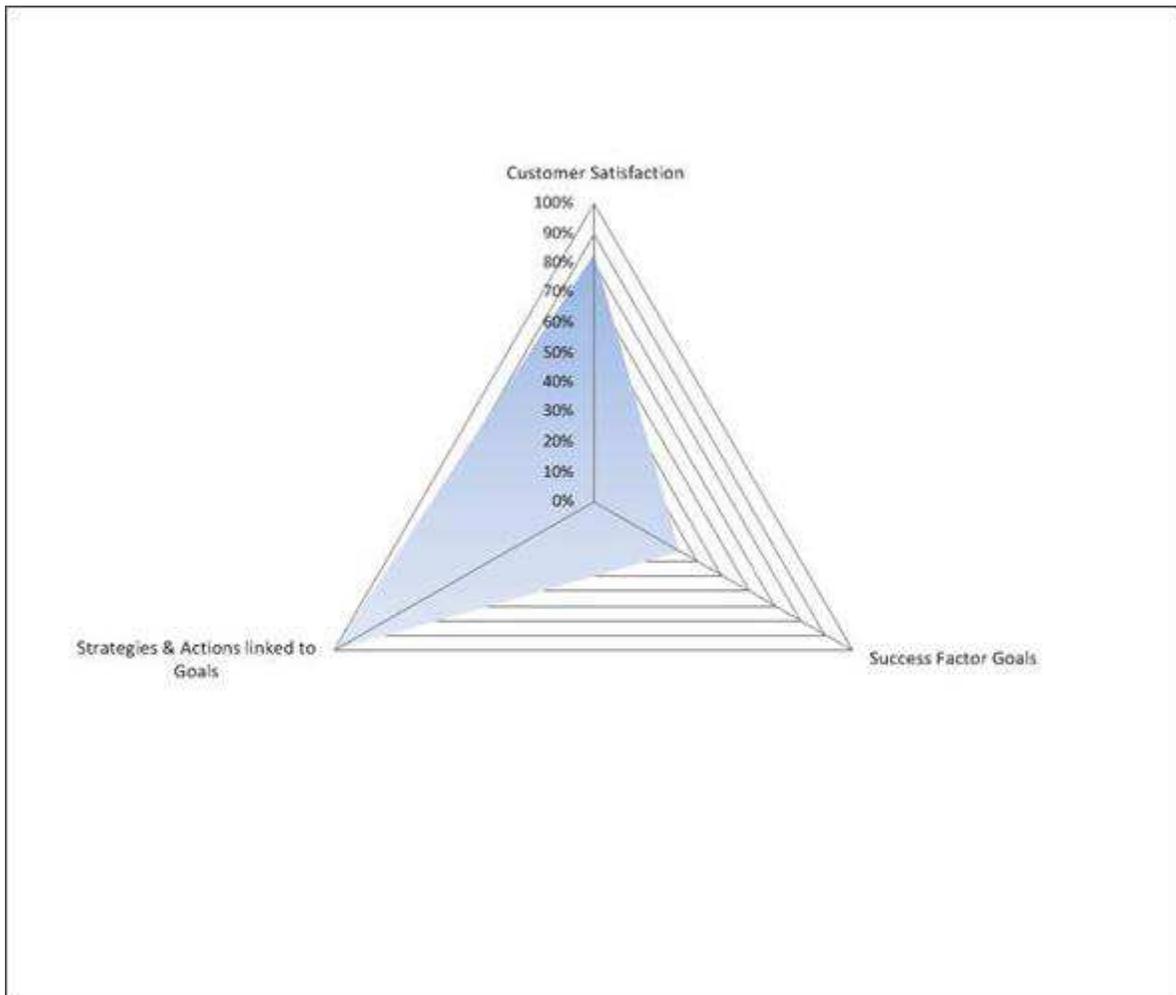
You should review the following quadrants of your business and develop a set of goals and a scorecard for each area.

- Customer Scorecard
- Systems and Processes Scorecard
- Innovation and Learning Scorecard
- Financial and Combined Scorecard

Based on your answers to our questionnaire your business scored is 72% in this area.

| Topic                                | Analysis Area   | Score |
|--------------------------------------|---|-------|
| Customer Satisfaction                | Have you brainstormed with staff and customers to determine the 5 key things that determine whether your customers are happy?                   | 5     |
| Success Factor Goals                 | Do you have a documented list of 8-15 goals that will determine your business success? These goals should be financial and non-financial goals. | 2     |
| Strategies & Actions linked to Goals | Do you have a series of actions and strategies linked to these success factor goals?  | 6     |

## Graph of Strategic Goals



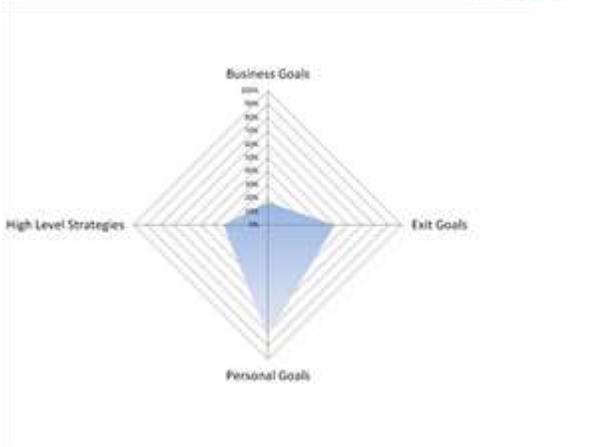
**Breakdown of results for all 7 areas provided in full report!!!**

# One Page Snapshot of Results

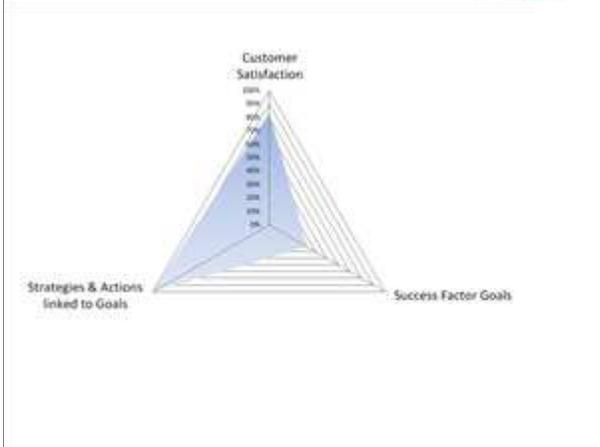
Your Score

58%

## High Level Goals



## Strategic Goals



## Milestones/Actions



## Monthly Business Review



## Systems & Workflow



## Employee Engagement





# CLIENT DEVELOPMENT ACTION PLAN

| CATEGORY           | TOPIC                                | ACTION   | NOTES                                      | WHO | WHEN | COMPLETE |
|--------------------|--------------------------------------|--|--|-----|------|----------|
| High Level Goals   | Business Goals                       | <i>Define your business goals. Documented where your business is now and where it will be in 3 years.</i>                                      | <i>Haven't been updated since 2012</i>     |     |      | 17%      |
| High Level Goals   | Exit Goals                           | <i>Ensure that your Exit and Succession goals are documented with where you are now and where you wish to be in 3 years.</i>                   |  |     |      | 50%      |
| High Level Goals   | Personal Goals                       | <i>Ensure that your personal goals are documented with where you are now and where you wish to be in 3 years.</i>                              | <i>Updated at start of financial year!</i> |     |      | 83%      |
| High Level Goals   | High Level Strategies                | <i>Ensure that you have documented your business' strategies and have defined how your business stands out from other competitors.</i>         | Documented, however no longer up to date   |     |      | 33%      |
| Strategic Goals    | Customer Satisfaction                | <i>Ensure to brainstorm with both staff and customers to ensure that you understand the 5 key things that determine customer satisfaction.</i> | <i>Result</i>                              |     |      | 83%      |
| Strategic Goals    | Success Factor Goals                 | <i>Ensure that you have 8-15 goals documented that will determine the business' success.</i>   |  |     |      | 33%      |
| Strategic Goals    | Strategies & Actions linked to Goals | <i>Ensure that there is a series of actions and strategies linked to these success factor goals.</i>   |  |     |      | 100%     |
| Milestones/Actions | Milestones                           | <i>Ensure you have a list of annual milestones.</i>  |  |     |      | 67%      |

**Complete Action Plan provided in full Report!!**

